

Abstract

A method and system for managing customer service processes for individual customers and populations of customers. In a specific embodiment within the health care field, a clinician creates or updates a draft care plan for a patient using generic or locally-adapted template metadata and tailors the draft care plan to the particular patient. The

10 draft care plan includes a list of specific services (health care interventions) to be provided to the patient. The draft care plan can be routed to members of an inter-disciplinary team for input. Once finalized, workflow processes are instantiated for each intervention on the care plan. An itinerary is created for any required patient encounters, optimized using an algorithm that considers pre-existing process instances. A workflow

15 automation server manages the execution of each workflow process instance, invoking resources according to workflow process specification metadata and workflow task type metadata. Care plans and encounter itineraries are automatically translated to a patient-understandable form and made available to patients online and via printed copy. Clinical practice and outcomes data are analyzed to identify opportunities for improvement of the

20 metadata. The method and system also allows for the selection of a population of patients, the analysis of population data to identify opportunities for interventions (needed services), and the initiation of population interventions through batch updates to individual care plans.